



Community Impact Management

Agency Training Manual



UNITED WAY
Collier and the Keys

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Accessing e-Clmpact

Requirements: All you need to access e-Clmpact is a computer, smartphone, or tablet with an internet connection and a current version of a web browser (example: Microsoft Edge, Firefox, Chrome, Safari).

Direct access to the Agency Site is: <https://agency.e-clmpact.com/login.aspx?org=11190F>

Bookmark the address to easily access e-Clmpact in the future.

Note: your specific site may differ slightly from the images in this manual, depending on which features are being used and potential site updates.

Logging in for the first time:

A profile for your organization's **Primary Contact** has been created to access the e-Clmpact Agency Site. Your Primary Contact's username is their email address.

The first time you log in, the password will be *pwd123*. After that, you will automatically be prompted to change your password the first time you log in.

Signing In

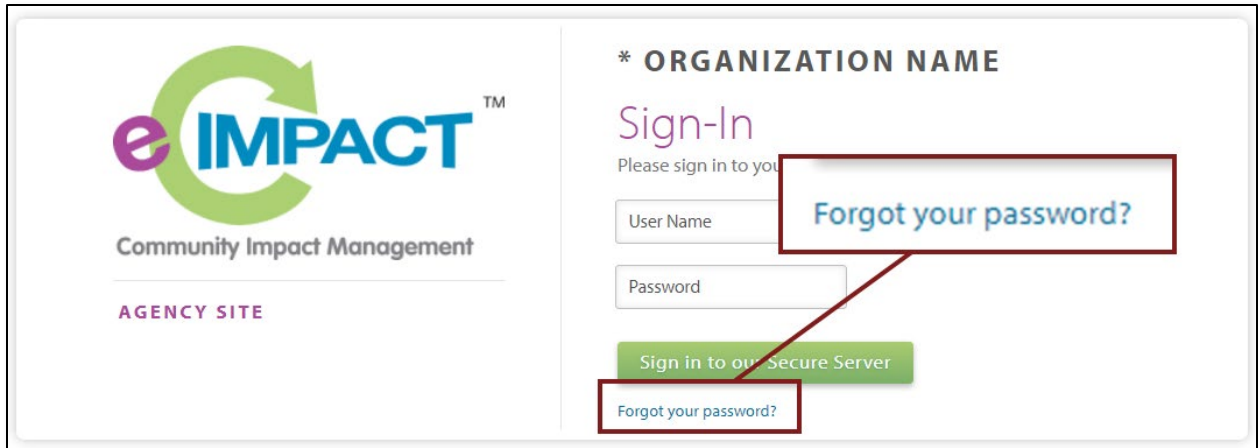
Step 1: Enter your username and password

Step 2: Click 'Sign In to our Secure Server'

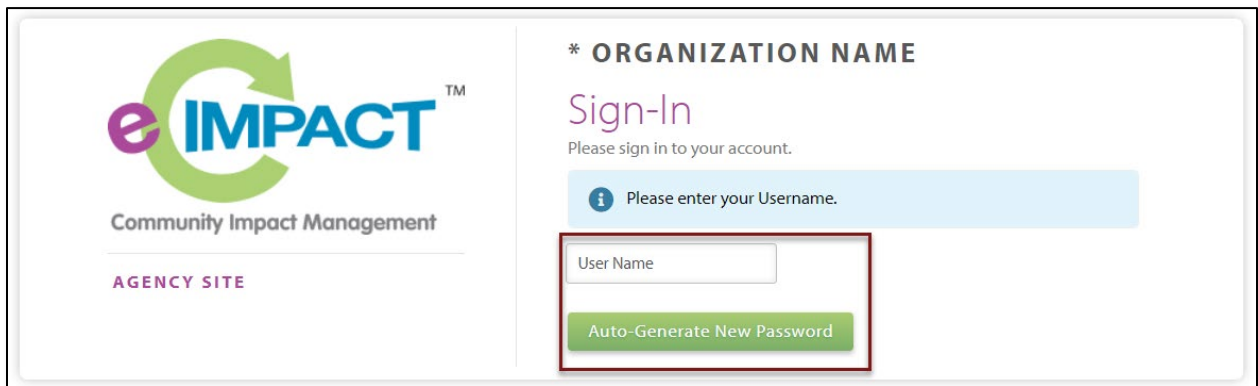
The screenshot shows the login interface for the e-IMPACT Agency Site. On the left, there is a logo with a green circular arrow and the text 'e IMPACT™ Community Impact Management AGENCY SITE'. On the right, under the heading '* ORGANIZATION NAME', there is a 'Sign-In' section. It prompts the user to 'Please sign in to your account.' and contains two input fields: 'User Name' and 'Password'. Below these fields is a green button labeled 'Sign in to our Secure Server' and a link for 'Forgot your password?'. A red rectangular box highlights the 'User Name', 'Password', and 'Sign in to our Secure Server' button area.

Forgot Password

Step 1: Click 'Forgot your password?' on the agency login page



Step 2: Enter your username and select 'Auto-Generate my Password'



Step 3: A temporary password will be sent to the email address associated with your e-Clmpact account. Once received, return to e-Clmpact within 10 minutes and log in. If you do not see the email in your inbox, check the 'junk' folder. If the email is not in either location, contact Rebecca Zehr or Tiffany Pellicier.

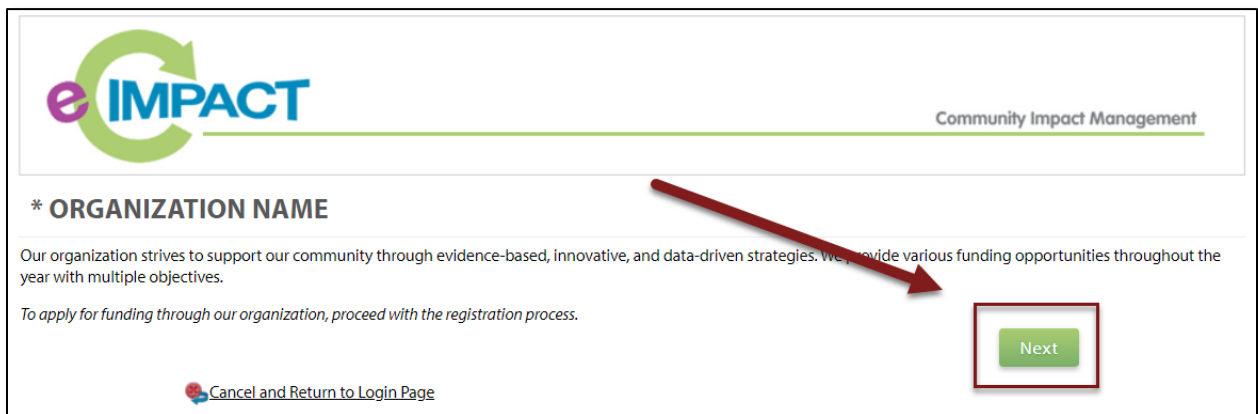
Registering a New Agency

If you are not yet a/an United Way of Collier and the Keys Partner Agency, proceed with site registration to create an e-Clmpact profile.

Step 1: From the Agency Site login page, select 'Click here to create a new e-Clmpact account'




Step 2: Read all directions carefully, then click 'Next' to continue with your registration process



Step 3: Enter all required agency information, then click 'Next' to proceed to the next page

Note: e-Clmpact will screen your EIN, agency name, and website URL, confirming you do not already have an e-Clmpact account.



*** ORGANIZATION NAME**

*** Organization Name Agency Registration**

i Fields marked with an * are required fields.

Enter registration information to create an e-Clmpact account.

Agency Account Information

EIN:*

Agency Name:*

Website URL:

Address

Address Type:*

Address Line 1:*

Address Line 2:

City:*

State:*

Zip Code:*

State:*

Zip Code:*

Email Address

Email Address Type:*

Email Address:*

Phone Number

Phone Number Type:*

Phone Number:*

Primary Contact Information

Contact Type:*

First Name:*

Last Name:*

Preferred Login

Preferred User Name:*

Password:*

Confirm Password:*

[Cancel and Return to Login Page](#)


Step 4: Select the desired funding opportunity and continue to the next page

Please review the list of currently available funding opportunities below

Select a funding opportunity from the list to request an application. Some applications may require pre-qualification information be provided.

Transformation Funding

2023/24 Cycle

 **Grant Application**

This is an example Grant Application illustrating how it will appear in e-Clmpact.

The Transformation Initiative is a long-standing effort to create community change by enabling effective, research-backed, and outcome-driven programs.

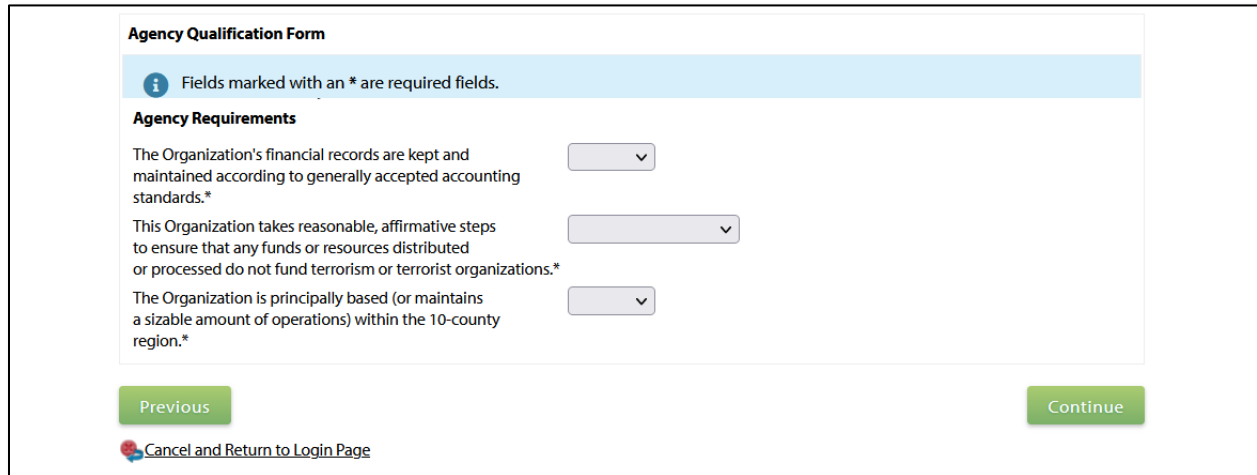
Need Help? Please contact us so we can assist you!

[Cancel and Return to Login Page](#)

e-Clmpact™ Community Impact Management

Step 5: Answer all qualification questions and proceed to the next page

Note: If your agency passes the initial qualification questions, you will move forward to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact with any questions.



Agency Qualification Form

Fields marked with an * are required fields.

Agency Requirements

The Organization's financial records are kept and maintained according to generally accepted accounting standards.*

This Organization takes reasonable, affirmative steps to ensure that any funds or resources distributed or processed do not fund terrorism or terrorist organizations.*

The Organization is principally based (or maintains a sizable amount of operations) within the 10-county region.*

[Previous](#) [Continue](#)

[Cancel and Return to Login Page](#)

Step 6: Review all agency information entered and click 'Complete Registration'

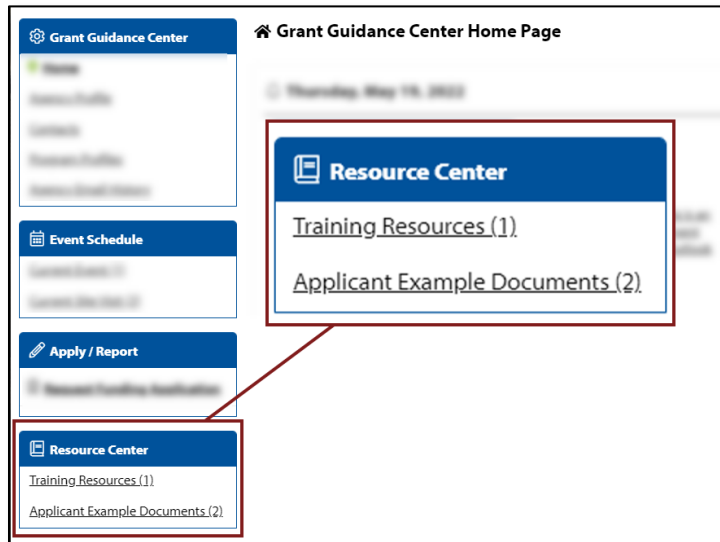
[Complete Registration](#)

Once your registration is completed, you will be able to print your confirmation page.

We will review your registration and you will be notified whether your registration is approved or denied via email.

Accessing the Full Agency Site Manual

To access the rest of the e-Clmpact Agency Training Manual, go to the Resource Center located on the lower-left side of the Agency Site home page.



Common Navigation

The navigation links in e-CImpact are consistent throughout the site.

Saving information:



Save/Update: Saves any changes made to the page and refreshes.



Save and Return to Previous Page: Returns you to the page last visited while saving any changes.



Cancel and Return to Previous Page: Returns you to the previous page and will NOT save any changes made since the last save.

Required Fields:

When entering data, some fields are required. An * symbol identifies these.



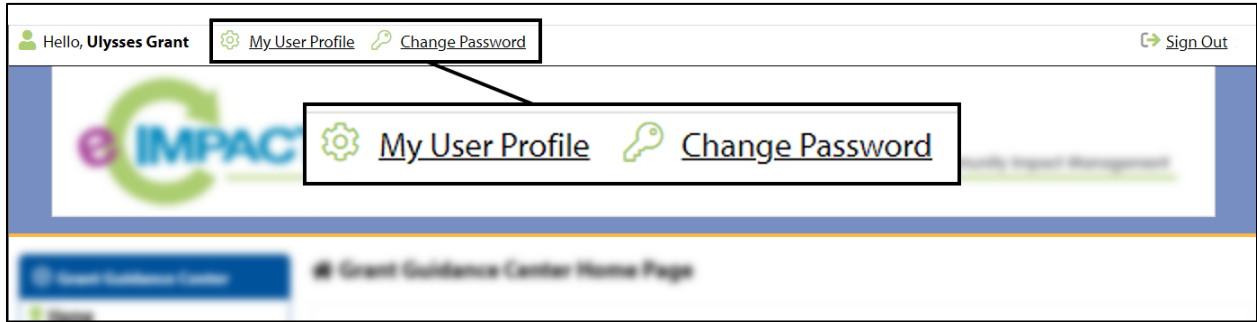
Fields marked with an * are required fields.

Agency Site Home Page

From the home page, you will be able to access all parts of the Agency Site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendar
4. Resource Center
5. Application(s) and/or Report(s)

Account Management: Updating Password and User Profile



Change Password

Step 1: To change your password, select 'Change Password'

Step 2: Enter your old password

Step 3: Enter a new password and verify it

Password Rules:

- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the following: alpha, numeric, or special characters.
- Characters NOT accepted are: ", % or any white space.

User Profile


The 'My User Profile' area is where you can edit your name or add, edit, or remove your contact information.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the 'Primary?' check box. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected.

Active: Make sure your account is 'Active'. Once a user is deactivated, you may need to contact Rebecca Zehr or Tiffany Pellicier to reactivate the user account.

Include in all Emails: The 'Include in all Emails' setting allows you to designate which contacts should receive emails through e-IMPACT.

My User Profile


 Fields marked with an * are required fields.


Primary?
 Include in all Emails?
 Active?


Type:*

First Name:*


Last Name:*

 [Save/Update](#)


 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)


Email Addresses

 [Add New Email Address](#)

Phones

 [Add New Phone Number](#)

Addresses

 [Add New Address](#)

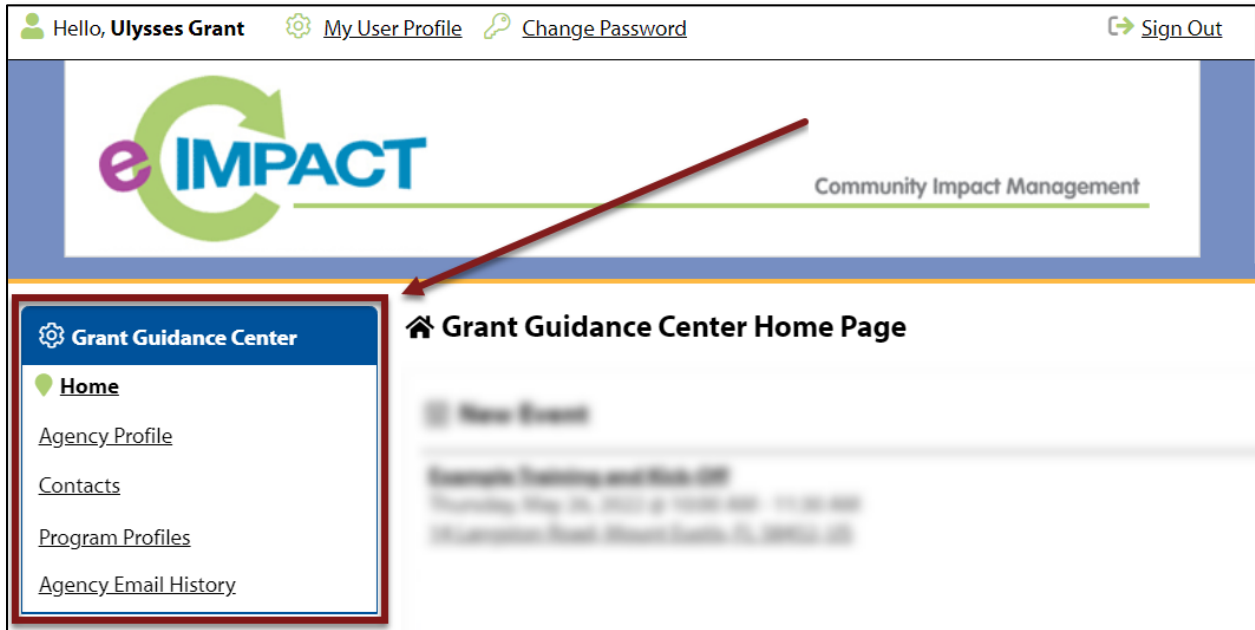
Enter any necessary information and save.

Sign Out

It is always recommended to sign out of a website (including e-Clmpact) before closing the site window to ensure the security of your data.

Agency Information

The 'Agency Information' section is where account information, contacts, statements (mission / vision / agency), program information, email history, and more are housed. This list will vary depending on what tools United Way of Collier and the Keys is using at the time.





Agency Profile

The 'Agency Profile' page is where all agency-specific profile information is housed and will appear under your agency's name in the page's top-left corner.

The profile includes information such as the: Agency Name, EIN, Primary Contact designation, Website, and more. Depending on site settings, some information may be editable or read-only, while others may only be editable through application forms.

Agency Profile

 Fields marked with an * are required fields.

Agency Name:* Grant Guidance Center
Primary Contact: 
Website:

 [Save/Update](#)

Addresses

Type	Address	Primary?	Actions
------	---------	----------	---------

 [Add New Address](#)

Phone Numbers


Type	Phone Number	Primary?	Actions
------	--------------	----------	---------

 [Add New Phone Number](#)

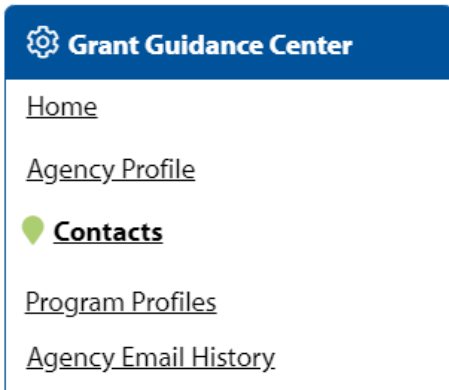
Email Addresses

Type	Email Address	Primary?	Actions
------	---------------	----------	---------

 [Add New Email Address](#)

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Agency Contacts



To view a list of your agency's contacts – click 'Contacts' from the 'Agency Information' section on the homepage.

Here you can see anyone listed as a contact at your agency and add, edit, deactivate, or delete an agency contact.

This page includes all agency contacts created in e-Clmpact, even those without login capabilities.

Contacts								
First Name	Last Name	Type	Phone	Email	Login	Primary?	Active?	Actions
Henry	Wilson	Program Director	(202) 456-1128	vp18@dc.gov	HenryWilson	No	Yes	Edit Delete
Ulysses	Grant	Executive Director		president18@dc.gov	UlyssesGrant	Yes	Yes	Edit

It is highly recommended to create a unique contact profile for each individual at your organization accessing e-Clmpact. Do not share your password with anyone else.

The 'Contacts' page is similar to the User Profile and contains the:

- Name and preference
- Email address(es)
- Phone number(s)
- Address(es)

Primary?

Include in all Emails?

Active?

When adding a new agency contact or updating existing contacts, select 'Active' appropriately.

'Primary' can only be selected for one contact.

Creating an Agency Contact

Step 1: Click 'Add New'



Step 2: Enter information for the new agency contact. *Note that the * symbol indicates required fields.*

Step 3: If the agency contact should have access to e-Clmpact, check 'Do you want to create a Login Account to e-Clmpact for this contact?' By default, the email address will be the username, and the password will be emailed directly to the new contact.

Adding login capabilities to a contact may require approval by United Way of Collier and the Keys

Login Account

Do you want to create a Login Account to e-Clmpact for this contact?

Requesting a Login for an Existing Contact

Contacts can be added to e-Clmpact but are not given login capability. If a contact has previously been created but has not been given login capabilities, this can be requested later.

Step 1: Click 'Request a Login'

Contacts								
First Name	Last Name	Type	Phone	Email	Login	Primary?	Active?	Actions
Ulysses	Grant	Executive Director		president18@dc.gov	UlyssesGrant	Yes	Yes	Edit
Henry	Wilson	Program Director	(202) 456-1128	vp18@dc.gov	HenryWilson	No	Yes	Edit Delete
Steven	Shaw	Chief Financial Officer		SShaw@dc.gov	Request a Login	No	Yes	Edit Delete

[+ Add New](#)

Step 2: Review contact information and click 'Confirm Login Request for this User' By default, the email address will be the username, and the password will be emailed directly to the new contact.

Note: Creating logins for new contacts may require approval by United Way of Collier and the Keys

Updating Program Information

Step 1: To edit or deactivate a program, go to the 'Program Profiles' area.

Step 2: Select 'Edit' next to the desired program

Program Profiles			
Program Name	Program Primary Contact	Status	Actions
Early Grade Reading Partnership		Active	Edit
Life Skills for Life		Active	Edit

From here, you may update or deactivate the program as needed. Some information may be read-only and updated by contacting United Way of Collier and the Keys. Some data may only be updated when completing an application.

Calendar

The 'Calendar' area will display any events or site visits you have RSVP'd for. Some news items may display here as well.

May 2022							Today
Sun	Mon	Tue	Wed	Thu	Fri	Sat	• None Scheduled
24	25	26	27	28	29	30	May <ul style="list-style-type: none">• 5/20/2022: 2023-2025 Application Training
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31	1	2	3	4	

Meetings and Events / Site Visits Modules

The 'Meetings and Events' and 'Site Visits' scheduling tools allow you to view invitations, RSVP, and access invitation details in e-Clmpact.

Meetings and Events

When available, you can view and RSVP for United Way of Collier and the Keys events in e-Clmpact.


Step 1: To access the 'Meetings and Events' section, select 'Current Event'

Event	Actions
Example Training and Kick-Off Thursday, May 26, 2022 @ 10:00 AM - 11:30 AM 14 Langston Road, Mount Eustis, FL 58452, US This is an example event appointment that could be listed in e-Clmpact	View Detail / RSVP Add to Outlook Add to Google Calendar View Map

Please [RSVP](#) for this Event!

Step 2: Select 'Please RSVP for this Event!' or 'View Details / RSVP'

Step 3: The 'Attendees' list displays all staff invited to the event and shows if the invitee(s) will attend



 **Event Schedule > Current Event > RSVP**

Event: Example Training and Kick-Off
 Date: Thursday, May 26, 2022 @ 10:00 AM - 11:30 AM [Add to Outlook](#) / [Add to Google Calendar](#)
 Address: 14 Langston Road, Mount Eustis, FL 58452 [View Map](#)
 Description: This is an example event appointment that could be listed in e-Clmpact

Attendees


14 Remaining Attendee Slot(s)

Ulysses Grant: Will Attend Will Not Attend
 Henry Wilson: Will Attend Will Not Attend

 [Save and Return to Previous Page](#)
 [Cancel and Return to Previous Page](#)

Step 4: Click 'Save and Return to Previous Page'

Step 5: Add the event to Outlook or Google Calendar, or view the location on a map as needed

 **Event Schedule > Current Event**

Event	Actions				
<p>Example Training and Kick-Off Thursday, May 26, 2022 @ 10:00 AM - 11:30 AM 14 Langston Road, Mount Eustis, FL 58452, US</p> <p>This is an example event appointment that could be listed in e-Clmpact</p> <p>Attendee Summary</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">Will Attend</td> <td style="width: 50%; border-bottom: 1px solid black;">Will Not Attend</td> </tr> <tr> <td>Ulysses Grant</td> <td>Henry Wilson</td> </tr> </table>	Will Attend	Will Not Attend	Ulysses Grant	Henry Wilson	<p>View Detail / RSVP Add to Outlook Add to Google Calendar View Map</p>
Will Attend	Will Not Attend				
Ulysses Grant	Henry Wilson				

Site Visits Scheduler

When offered, you can reserve time slots for site visits in e-Clmpact. **We typically assign time slots to facilitate our travel, given our large coverage area.**

Step 1: To access the 'Site Visit' section, select 'Current Site Visit'


Step 2: Click 'Reserve Time Slot'

Step 3: Select the date and address desired

Step 4: Click 'Save/Update' or 'Save and Return to Previous Page'

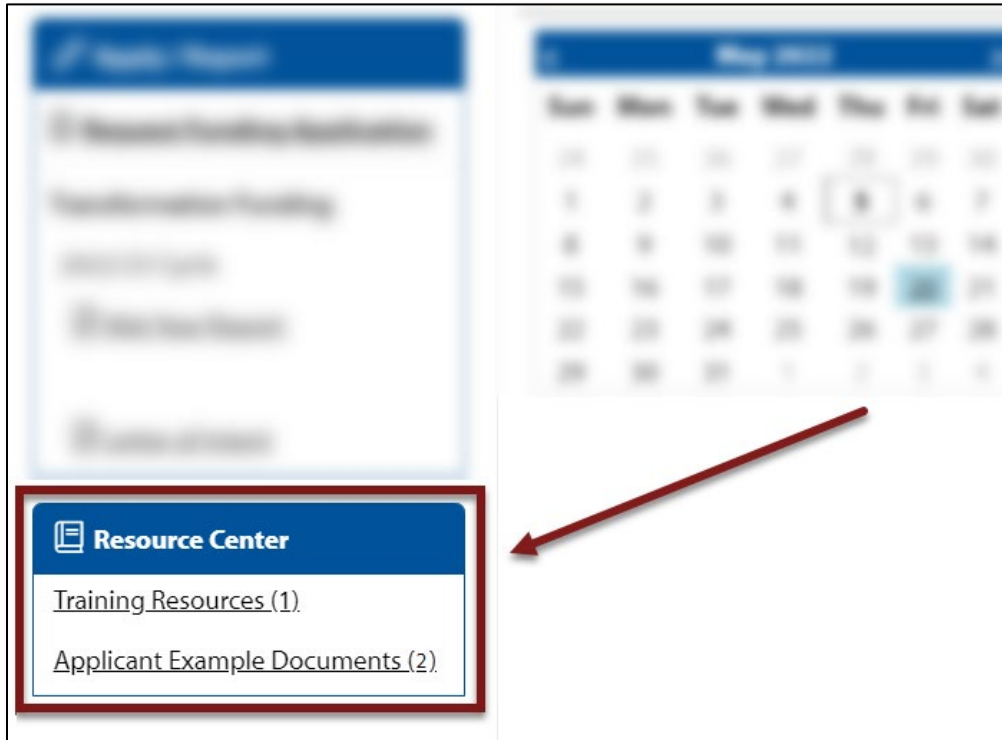
Step 5: Add the site visit appointment to Outlook or view it on a map

 **Event Schedule > Current Site Visit**

Site Visit	Actions
<p>New Grantee Check-In Monday, October 3, 2022 11:00 AM - 12:00 PM <u>1617 Pennsylvania Avenue, Washington, DC 20500, US</u></p> <p> You have signed up for this Site Visit!</p>	<p>Edit Reservation Add to Outlook View Map</p>

Resource Center

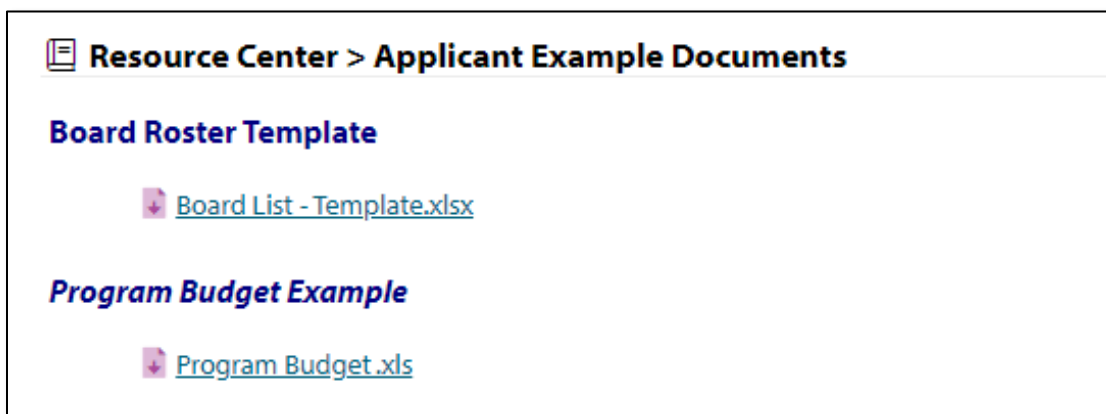
The 'Resource Center' is where you can find files United Way of Collier and the Keys has posted for your reference. The Resource Center is located in the lower half of the left-hand navigation column.



Accessing Resources

Step 1: Select the desired Resource Center item

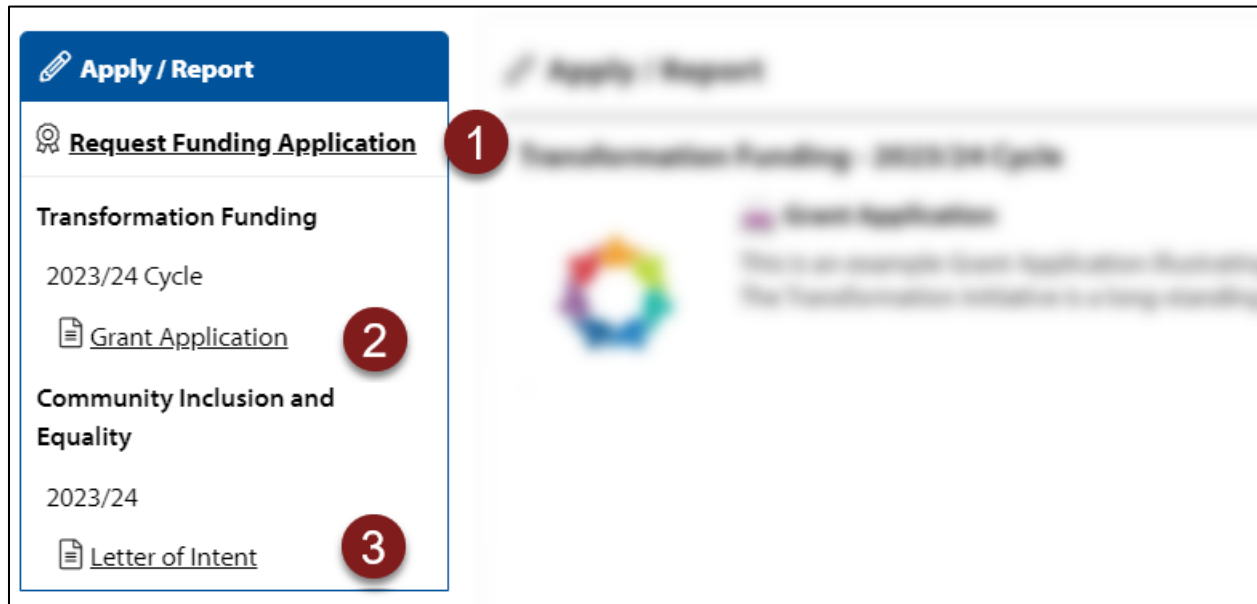
Step 2: Click on the attachment link to open/download



The Basics of your Application / Grant Process

Accessing the Application / Grant Process

Choose the application or grant process from the list located in the left-hand navigation.



- 1 Depending on your site's configuration, you may need to initially access the application by clicking on 'Request Funding Application'. A qualification form or approval by United Way of Collier and the Keys may be required.
- 2 If you have already gone through that stage, or your organization has been pre-assigned to the application, it may already be visible.
- 3 Later, if other processes are assigned, such as another funding type, they will also be visible in this section.

Viewing the Application Forms & Tracking Your Progress

The application page contains the forms and works as a checklist. Each form contains a part of the application. You can easily see how much of the application you have completed by looking at the Status column.

Grant Application Status [View Printable Version of this Entire Grant Application](#)

Not Started In Progress Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Grant Guidance Center		Not Started	
Basic Agency Information - Example Form*		<input type="radio"/> Not Started	
Agency Attachments - Example		<input type="radio"/> Not Started	
★ Early Grade Reading Partnership		Not Started	<input checked="" type="checkbox"/> Include?
Program Information - Example Form*		<input type="radio"/> Not Started	
Program Budget - Example Form*		<input type="radio"/> Not Started	
Client Demographics - Example Form*		<input type="radio"/> Not Started	

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Form Statuses:

Not Started: When the application or form is in 'Not Started' status, it means that no data has been entered.

In Progress: If your form is 'In Progress', the form has been started and saved. The form has not been marked Completed. The top bar will remain 'In Progress' until all forms are completed.

Ready to Submit: Once all forms are finished and marked 'Completed', your top bar will move to 'Ready to Submit'. You should review any information entered at this stage and then submit your application.

Submitted: When an application is in 'Submitted' status, you will no longer be able to change the information on the forms. If you submit and need to make an edit, contact Rebecca Zehr or Tiffany Pellicier.

Adding New or Existing Programs

Depending on the application, programs may need to be added. This may mean assigning existing programs or creating new ones. Programs may require a qualification form and/or approval from United Way of Collier and the Keys to be added to the application.

Adding an Existing Program

If applying for a program that has an existing profile in e-Clmpact, use the existing profile instead of creating a new one.

Assign Programs to this Grant Application

At least one program is required for this application for funding.

To add a program to this application, select a program from the drop down (if available), or if there is no drop-down displayed, select 'Create a new Program.'

Click the link to 'Create a New Program and Assign it to this Application' to proceed to the Add new program profile page. Do not create duplicate programs.

Please ensure to click 'Complete Registration' on the Review page to successfully add your program to the application. When the Program Profile registration is complete, all of the forms for that program will display in your list of forms below.

Select a Program:

[➔ Assign Selected Program to the Form Packet](#)

[+ Create a New Program and Assign it to this Form Packet](#)

[View Printable Version of this Entire Grant Application](#)

Grant Application Status

Not Started In Progress Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Grant Guidance Center		Not Started	
Basic Agency Information - Example Form*		● Not Started	
Agency Attachments - Example		● Not Started	

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Step 1: Use the drop-down menu to select an existing program profile, then click 'Assign Selected Program to the Form Packet'

Select a Program:

[➔ Assign Selected Program to the Form Packet](#)

Step 2: Review the program information and complete registration. This may include completing several qualification questions to determine if the program meets basic eligibility criteria.

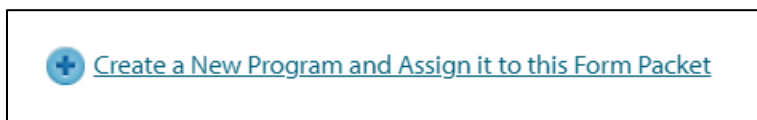
Step 3: Confirm your submission by clicking 'Complete Registration'

At this time, the program may be automatically approved or denied or require manual approval by United Way of Collier and the Keys.

Step 4: Click 'Continue' to return to the application

Adding a New Program

Step 1: Click 'Create a New Program and Assign it to this Form Packet'



Step 2: Complete the required program registration information and click 'Save/Complete Registration'. This may include completing several qualification questions to determine if the program meets basic eligibility criteria.

Step 3: Confirm your submission by clicking 'Complete Registration'

At this time, the program may be automatically approved or denied or require manual approval by United Way of Collier and the Keys.

Step 4: Click 'Continue' to return to the application

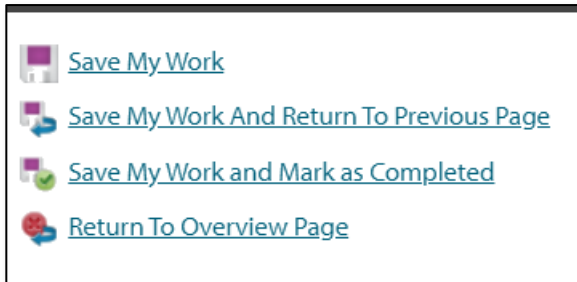
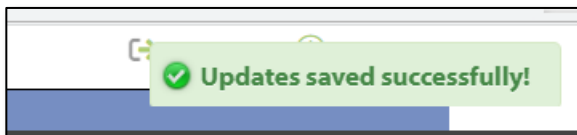
Entering Information

To begin filling out your application, click on the desired form. The form will open, and the application can be started.

Not Started		In Progress	Ready To Submit
Item (* indicates Required Item)	Last Updated	Status	
★ Grant Guidance Center		Not Started	
<u>Basic Agency Information - Example Form*</u>		● Not Started	
<u>Agency Attachments - Example</u>		● Not Started	
★ Early Grade Reading Partnership		Not Started	
<u>Program Information - Example Form*</u>		● Not Started	
<u>Program Budget - Example Form*</u>		● Not Started	
<u>Client Demographics - Example Form*</u>		● Not Started	

Save Options

The following options are also available for saving and submitting the form:



Auto-Save: Changes will automatically be saved when moving from between questions on the form.

Save My Work / Save My Work and Return to Previous Page: These options allow you to save your changes and stay on the page to continue working or return to the list of forms after saving.

Save My Work and Mark as Completed: When all information has been entered in the form and reviewed, it should be marked 'Completed'. All forms

must be completed before the application can be submitted.

Return To Overview Page: Returns you to the form list and will NOT save any changes made since the last save.

Switching Forms

There are multiple ways to switch forms within an application:

Option 1: Exit the form by clicking on 'Save My Work and Return to Previous Page' or 'Save My Work and Mark as Completed', then select the next form.

Option 2: Click 'Switch Forms', located in the upper right-hand corner. This will save the current form and switch to a new one.

Step 1: Click 'Switch Forms' to view the list of available forms

2023/24 Cycle - Grant Application

Grant Guidance Center

Status: ● In Progress

Basic Agency Information

Agency Name*	Grant Guidance Center
Executive Director Name*	Ulysses Grant
Agency Phone	(202) 456-1128

Step 2: Select the form to open it

Switch Forms

At any time you may select another form to work on. Your work on this form will be saved automatically.

Form Name	Status
★ Grant Guidance Center	In Progress
Basic Agency Information - Example Form*	● In Progress
Agency Attachments - Example	● Not Started
★ Early Grade Reading Partnership	Not Started
Program Information - Example Form*	● Not Started
Program Budget - Example Form*	● Not Started
Client Demographics - Example Form*	● Not Started
★ Guiding Lights	Not Started
Program Information - Example Form*	● Not Started
Program Budget - Example Form*	● Not Started

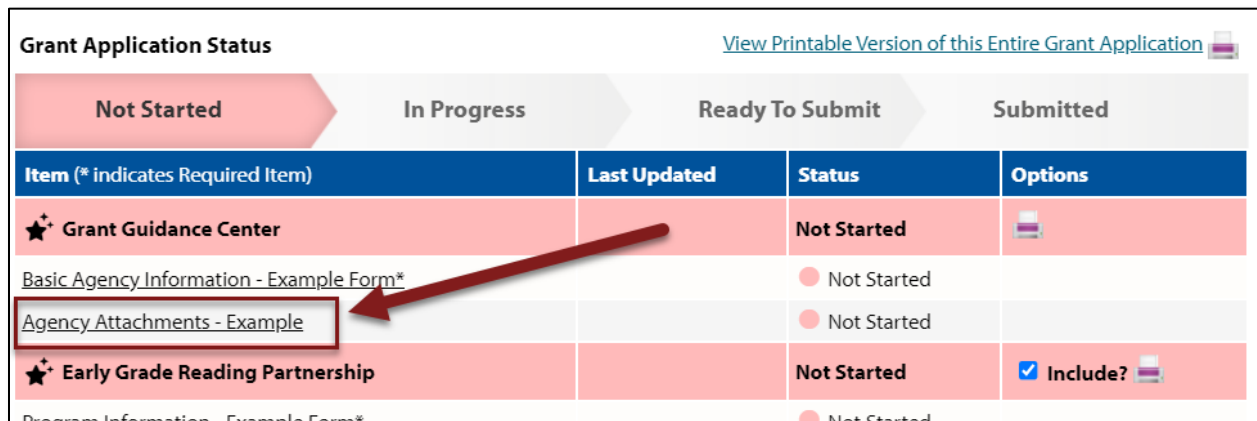
Attachments

Uploading Attachments

The following file types are accepted for uploading attachments, although they may vary by attachment: pdf, doc, docx, rtf, xls, xlsx, csv, txt, gif, jpg, jpeg, tif, bmp, png, eps, ppt, pptx.

Maximum individual file size: 32 MB; Combined maximum file size: 64MB

Step 1: Open 'Agency Attachments', (sometimes called Required Documents or Uploads)

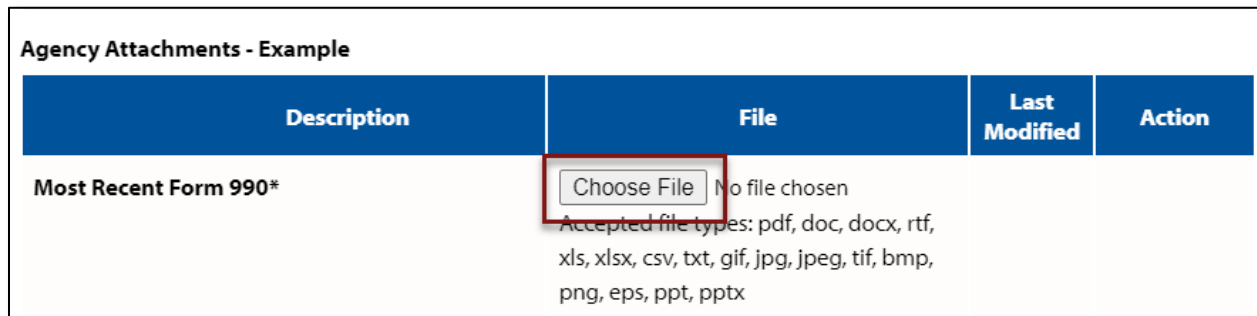


Grant Application Status [View Printable Version of this Entire Grant Application](#)

Not Started In Progress Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Grant Guidance Center		Not Started	
Basic Agency Information - Example Form*		Not Started	
Agency Attachments - Example		Not Started	
★ Early Grade Reading Partnership		Not Started	<input checked="" type="checkbox"/> Include?
Program Information - Example Form*		Not Started	

Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'



Agency Attachments - Example

Description	File	Last Modified	Action
Most Recent Form 990*	<input type="button" value="Choose File"/> No file chosen Accepted file types: pdf, doc, docx, rtf, xls, xlsx, csv, txt, gif, jpg, jpeg, tif, bmp, png, eps, ppt, pptx		

Step 3: Browse your computer and select the desired document

Step 4: 'Save/Upload Attachment(s)'

Agency Attachments - Example

Description	File	Last Modified	Action
Most Recent Form 990*	<input type="button" value="Choose File"/> Form 990 - ...xample.pdf Accepted file types: pdf, doc, docx, rtf, xls, xlsx, csv, txt, gif, jpg, jpeg, tif, bmp, png, eps, ppt, pptx		

Viewing Attachments

Step 1: Click on the document name to download and open it

Agency Attachments - Example

Description	File	Last Modified	Action
Most Recent Form 990*	<input type="button" value="Form 990 - Training Example.pdf"/>		<input type="button" value="Delete"/>

Deleting Attachments

In the event the wrong document was uploaded you may delete your attachment.

Step 1: Select 'Delete' next to the desired document

Agency Attachments - Example

Description	File	Last Modified	Action
Most Recent Form 990*	<input type="button" value="Form 990 - Training Example.pdf"/>		<input type="button" value="Delete"/>

Step 2: Confirm you would like to delete this attachment

You may now upload the correct attachment.

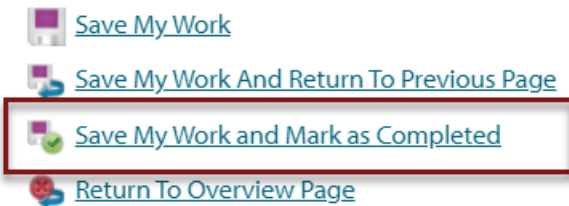
Completing and Submitting the Application

To submit your application, you must mark each form 'Completed'

Step 1: Open form

Not Started	In Progress	Ready To Submit
Item (* indicates Required Item)	Last Updated	Status
★ Grant Guidance Center		Not Started
Basic Agency Information - Example Form*		● Not Started
Agency Attachments - Example		● Not Started
★ Early Grade Reading Partnership		Not Started
Program Information - Example Form*		● Not Started
Program Budget - Example Form*		● Not Started
Client Demographics - Example Form*		● Not Started


Step 2: Complete the form, then click 'Save My Work and Mark as Completed'



Complete these steps for each form until you have completed the entire application.

Submit!

Once all forms are 'Completed / Ready to Submit', the 'Submit This Grant Application Now!' option will appear. Your options may vary slightly from the example below.


 Nice work, your Grant Application is now Ready to Submit! **Would you like to Submit This Grant Application Now?**


Grant Application Submission Details

Executive Director*:



Board President*:

I certify that the information submitted in this application is true and correct to the best of my knowledge*:

 **Submit This Grant Application Now!**

Grant Application Status [View Printable Version of this Entire Grant Application](#) 

Not Started
In Progress
Ready To Submit
Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Grant Guidance Center	5/19/2022 7:45 AM (CST)	Completed / Ready to Submit	
Basic Agency Information - Example Form*	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Completed / Ready to Submit	
Agency Attachments - Example	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Completed / Ready To Submit	
★ Early Grade Reading Partnership	5/19/2022 7:45 AM (CST)	Completed / Ready to Submit	<input checked="" type="checkbox"/> Include? 
Program Information - Example Form*	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Completed / Ready to Submit	

Step 1: Enter the requested submission details. Note: fields may vary based on grant requirements.

Step 2: Select 'Submit This Application Now!'

Now that you have successfully submitted your application, all forms are now in submitted status.

✓ Thank you for submitting your application. Once it has been reviewed, you will receive instructions for the next phase of the process.

Grant Application Submission Details

Executive Director: Ulysses Grant

Board President: Henry Wilson

I certify that the information submitted in this application
is true and correct to the best of my knowledge*:

Submitted By: Ulysses Grant on 5/19/2022 at 7:51 AM CST

Grant Application Status



[View Printable Version of this Entire Grant Application](#) 

Not Started

In Progress

Ready To Submit

Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Grant Guidance Center	5/19/2022 7:51 AM (CST)	Submitted	
Basic Agency Information - Example Form*	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Submitted	
Agency Attachments - Example	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Submitted	
★ Early Grade Reading Partnership	5/19/2022 7:51 AM (CST)	Submitted	<input checked="" type="checkbox"/> Include? 
Program Information - Example Form*	Ulysses Grant 5/19/2022 7:45 AM (CST)	● Submitted	
Program Budget - Example Form*	Ulysses Grant	● Submitted	

Note: Once an application is in 'Submitted' status you will be able to view the information entered, but the forms will be read-only.

Printing Options

- **Entire Application** – Print all forms within this application.
- **Agency Forms** – Print only the agency-specific forms.
- **Program Forms** – Print all forms for a specific program.
- **Individual Form** – Print an individual form.



Print this page



Save the page as a PDF file

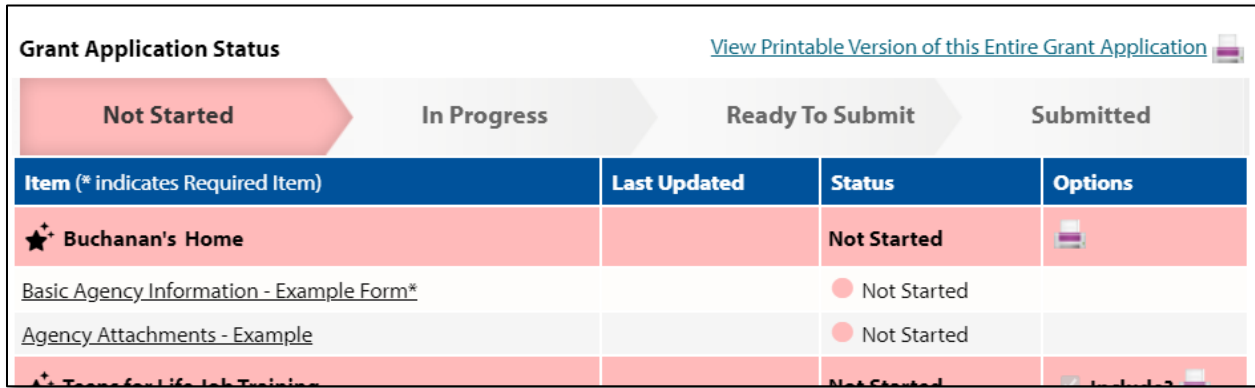


Open this page in a new browser tab

Printing the Entire Application

Step 1: Open the application by clicking on it in the left-hand navigation

Step 2: Click on the 'Print/Review Options' box in the upper right-hand corner of the main application page

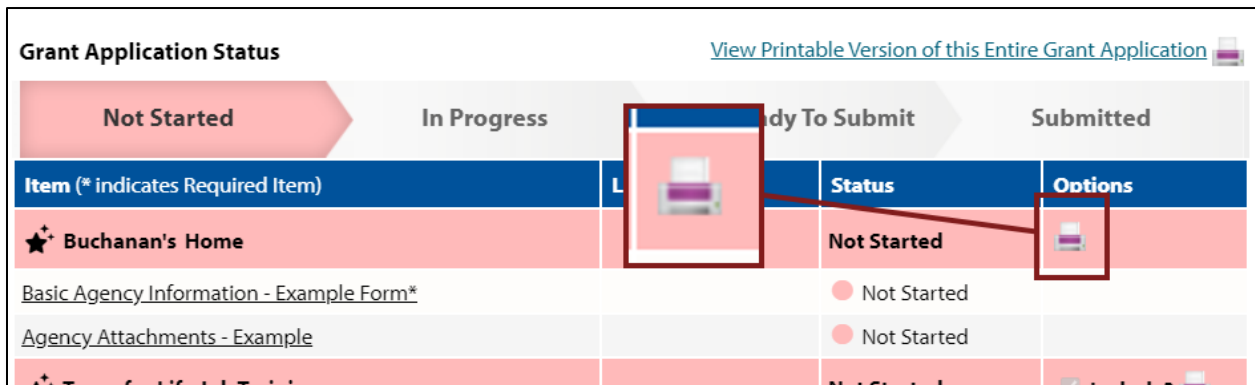


The screenshot shows the 'Grant Application Status' page. At the top right, there is a link: [View Printable Version of this Entire Grant Application](#) with a printer icon. Below this is a progress bar with four stages: 'Not Started' (highlighted in red), 'In Progress', 'Ready To Submit', and 'Submitted'. Underneath the progress bar is a table with the following columns: 'Item (* indicates Required Item)', 'Last Updated', 'Status', and 'Options'. The table contains three rows of items, all with a status of 'Not Started'. The first row is 'Buchanan's Home' with a printer icon in the 'Options' column. The second row is 'Basic Agency Information - Example Form*' with a red circle icon. The third row is 'Agency Attachments - Example' with a red circle icon. A fourth row is partially visible at the bottom.

Item (* indicates Required Item)	Last Updated	Status	Options
★ Buchanan's Home		Not Started	
Basic Agency Information - Example Form*		● Not Started	
Agency Attachments - Example		● Not Started	
★ Transfer Life Job Training		Not Started	

Printing Agency Forms

Step 1: From the main application page, click on the 'Print' icon in the agency section of the form list



This screenshot is identical to the one above, but with two red boxes highlighting specific elements. One box is around the printer icon in the 'Options' column of the 'Buchanan's Home' row. The other box is around the printer icon in the 'Ready To Submit' section of the progress bar. A red line connects the two boxes, indicating the relationship between the item's status and the available printing options.

Printing the Program Packet

Step 1: From the main application page, click the 'Print' icon next to the desired program

Grant Application Status [View Printable Version of this Entire Grant Application](#)

Not Started In Progress Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
★ Buchanan's Boys' Home		Not Started	
Basic Agency Information - Example Form*		<input type="radio"/> Not Started	
Agency Attachments - Example		<input type="radio"/> Not Started	
★ Teens for Life Job Training		Not Started	<input checked="" type="checkbox"/> Include?
Program Information - Example Form*		<input type="radio"/> Not Started	
Program Budget - Example Form*		<input type="radio"/> Not Started	
Client Demographics - Example Form*		<input type="radio"/> Not Started	

Individual Forms

Step 1: From the main application page, open the form you would like to print

Not Started In Progress Ready To Submit

Item (* indicates Required Item)	Last Updated	Status
★ Grant Guidance Center		Not Started
Basic Agency Information - Example Form*		<input type="radio"/> Not Started
Agency Attachments - Example		<input type="radio"/> Not Started
★ Early Grade Reading Partnership		Not Started
Program Information - Example Form*		<input type="radio"/> Not Started
Program Budget - Example Form*		<input type="radio"/> Not Started
Client Demographics - Example Form*		<input type="radio"/> Not Started

Step 2: Click the 'View Printable Version' button at the bottom of the form

[Save My Work](#) [View Printable Version](#)

[Save My Work And Return To Previous Page](#)

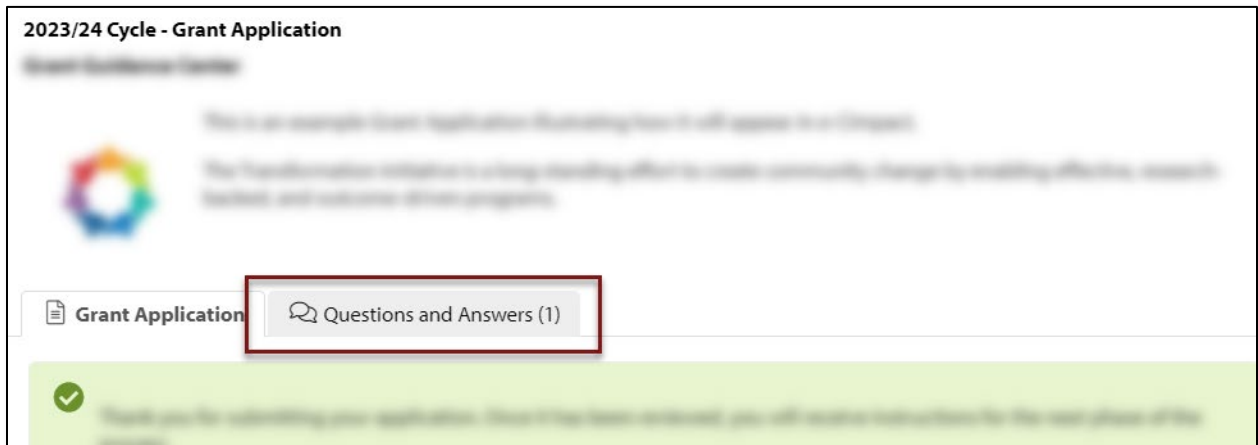
[Save My Work and Mark as Completed](#)

[Return To Overview Page](#)

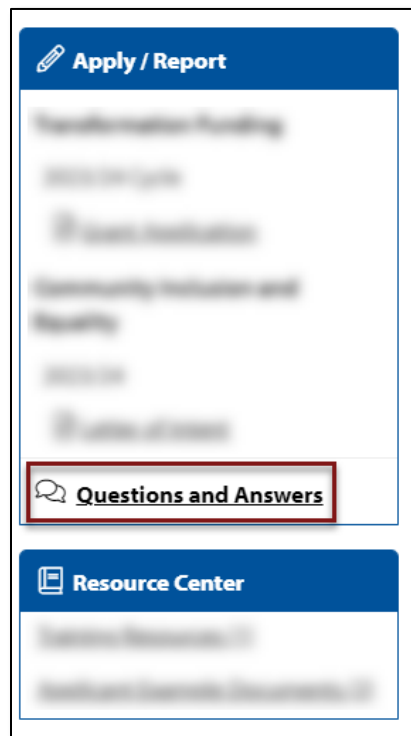
Questions and Answers

If questions are submitted through e-Clmpact during the review process, they may be viewed and responded to in the following locations:

Within the Application – a new tab will be added to the application if a volunteer has a question regarding that specific application.



Within the Overall Q&A List – at the bottom of the investment/application list – all questions and answers will be listed.



Home Page Notifications – new questions will display on your home page until viewed.

Recent Questions and Answers	
Questions and Answers	Actions
Example Question Program: Early Grade Reading Partnership Would the agency still be able to operate the program at a lower funding amount?	View

Responding to a Question – Home Page Notification

Step 1: Click 'View'

Recent Questions and Answers	
Questions and Answers	Actions
Example Question Program: Early Grade Reading Partnership Would the agency still be able to operate the program at a lower funding amount?	View

Step 2: Enter your response, then click 'Save and Return to Previous Page'

Example Question

Would the agency still be able to operate the program at a lower funding amount?

Limit up to 3000 characters.

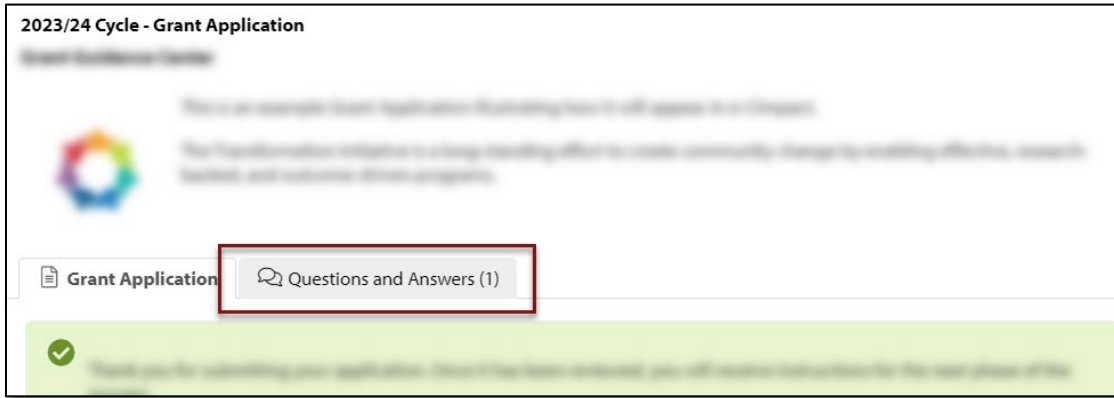
[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

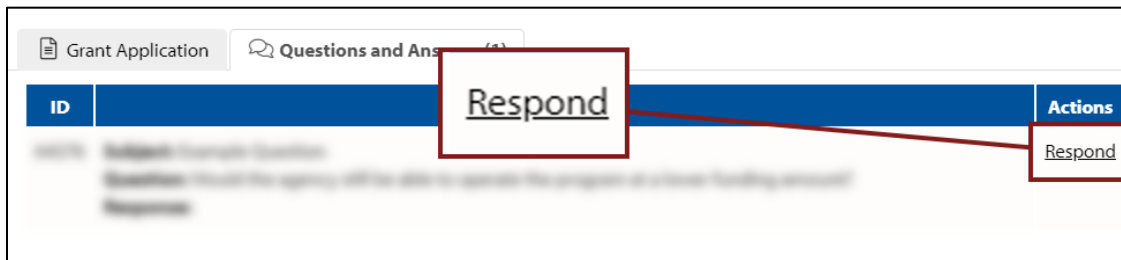
Responding to a Question – Within the Application

Step 1: Open the application

Step 2: Go to the 'Questions and Answers' tab to view the submitted questions



Steps 3: Select 'Respond' next to the desired question



Step 4: Enter your response, then click 'Save and Return to Previous Page'

Example Question

Would the agency still be able to operate the program at a lower funding amount?

Limit up to 3000 characters.

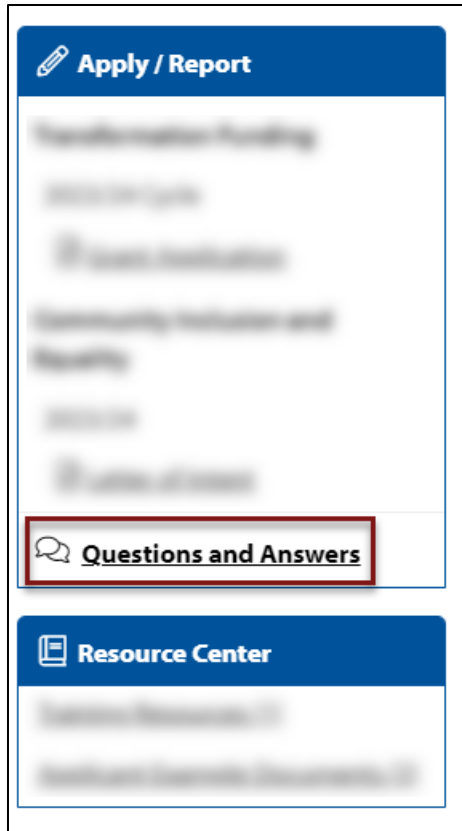
[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

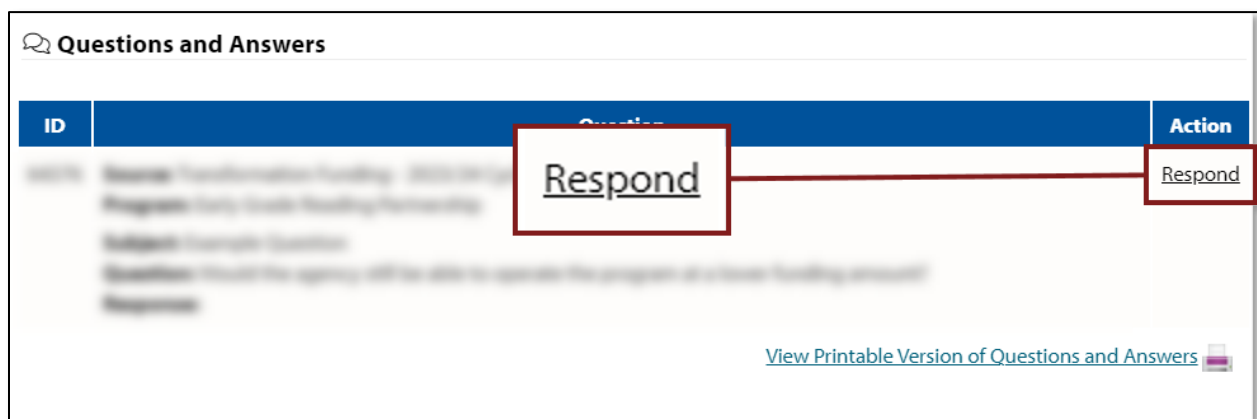
Once the answer is saved and approved by United Way of Collier and the Keys, it will display to the volunteers reviewing your application.

Responding to a Question – Overall 'Questions and Answers' List

Step 1: Click on 'Questions and Answers' in the left-hand navigation



Step 2: Click 'Respond' next to the desired question





Step 3: Enter your response, then click 'Save and Return to Previous Page'

Example Question

Would the agency still be able to operate the program at a lower funding amount?


Limit up to 3000 characters.



 [Save and Return to Previous Page](#)


 [Cancel and Return to Previous Page](#)

Print Questions and Answers

When in the overall 'Questions and Answers' area, click 'View Printable Version of Questions and Answers'.

 **Questions and Answers**

ID	Action
View Printable Version of Questions and Answers 	

[View Printable Version of Questions and Answers](#) 

Additional Instructions

You are welcome to download or print a copy of this manual. However, since much of the information here is proprietary, **please do not share it with anyone outside your organization.** We ask this to protect our vendor's work product.